



After [signing up to host](#), follow this comprehensive checklist to stay on track and deliver a standardized experience. **Highlighted documents** are located in the Toolkit online at [LunchandLearn.cloud](#).

T- 3 WEEKS +

- Review Event Details with the Acumatica Support Team.** Within 48 hours of submitting your Sign-Up Form at [LunchandLearn.cloud](#), a member of the Lunch & Learn Support Team will reach out via email. They will check in on any outstanding questions and you should do the same.
- As a host, you are responsible for setting up your own video conference bridge.
 - Schedule & Share.** Setup your video conference bridge with the appropriate time and date. Once complete, send an email to support@lunchandlearn.cloud with the appropriate log-in instructions (e.g., meeting URL, meeting ID, and password if required). If you are going to use Acumatica's registration platform (Cvent), the Support Team will add this information to the Confirmation Email that attendees receive after registering. Note: If you are not using Cvent as your registration, you do not need to send this information to the Support Team.
- Registration Confirmation and **Registering YOURSELF/DESIGNATED POINT OF CONTACT****
Only if Acumatica is managing Registration. After sharing your video conference bridge details, the Support Team will setup your Lunch & Learn registration on the Cvent platform – this is where attendees will register. As soon as you have email confirmation from the Support Team that your event is live (they will send you the URL), register yourself.
- Start Recruiting Prospects.** Begin Promoting your event! **Outreach Asset Download: Email Invitation Template.** Use this to begin email outreach by editing CUSTOM TEXT and adding YOUR LOGO before sending.
- Begin Receiving/Sending Registration Reports Weekly.**
 - Acumatica Managing Registration.** If you are using Cvent, every Wednesday, the Support Team will email Registration Reports containing names and emails of those registered. If you are in need of a Report earlier, please email support@lunchandlearn.cloud; the team responds within one business day.
 - Partner Managed Registration.** If you are not using Cvent, every Wednesday, email a copy of your Registration Report to the Support Team. In addition, send a report 3 days prior to your event and the day before your event so that the Support Team can send out Grubhub vouchers.

T- 2 WEEKS +

- Continue Recruiting Prospects.** Use email, social media, digital advertising, word-of-mouth, etc.
 - Outreach Asset Download: Social Media.** Edit the TEXT and add YOUR LOGO before posting.
 - Outreach Asset Download: Ad Banners.** If running Ads, use the graphics provided.

T- 1 WEEKS +

- Host Material Asset Downloads.**
Review the below. **Ensure you are PREPARED to deliver the Demo.**
 - Agenda Guidelines.**
 - All Video Assets, Demo Script, and Presentation.** Rehearse and customize by adding your LOGO.

T- 3 DAYS

- Send Personalized Email to Attendees.** If Acumatica is managing your Registration on Cvent, you will receive an Automated Email Reminder along with all registered attendees. We recommend you follow-up with a phone call to ensure participation.
- Receive / Send Registration Report & Send Calendar Meeting.** Create a meeting invite directly on your calendar and invite all registered attendees. Within the email, include:
 - 1) the video bridge instructions for dial-in and 2) Attach the **The Grubhub Guide**. Let them know you are looking forward to seeing them online and that they'll receive an email from Grubhub the day before the event with their lunch credit, reference the instructions for any questions.

T- 1 DAY

- Receive / Send Registration Report and Email from Grubhub.**
Use THIS list for check-in during your event. Your lunch credit will come via email directly from Grubhub - reference the **Grubhub Guide** for any questions you/your attendees may have.
- Finalize Video Bridge Technology.**
 - Familiarize yourself with the platform.** Make sure any downloads are on your computer.
 - Locate your headset/headphones.** The best attendee experience is when a host is speaking through a dedicated microphone.

EVENT DAY

- Log-in to the Video Bridge Meeting.** Remember to do this a minimum of 10 min prior.
 - Test your audio levels and video connection.**
 - Test the screen-share function.** Pull up your presentation deck to confirm slides are advancing. Leave the Opening slide up so attendees are greeted with a visual upon entry to the meeting.
- Greet Attendees and Manage Check-in.**
Use the Registration Report sent to you the day prior to check-in all attendees and add any new prospects. It is your responsibility to know who attends, record this, and report back to Acumatica.
- Follow Lunch & Learn Agenda Guidelines.**
Keep the event running on schedule. Thank attendees!
 - Welcome & Thank You.** **We recommend using your camera during both the Welcome and Closing to establish a personal connection with prospective customers.**

T+ 1 DAY

- Send your final Registration Report, in Excel, to support@lunchandlearn.cloud for program reporting.
- Sign Up to Host Your Next Lunch & Learn. Submit new dates and on the website [Sign Up Form](#).